Department of Accounts Reportline

User Manual

March 11, 2004

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Reportline Overview

Introduction

DOA has developed a web-based system that provides access to an electronic version of reports that are not currently received via Mantissa Remote Print.

Authorized users may access **Reportline** using the internet at

http://Reportline.doa.state.va.us

Reportline is user-friendly and requires little intervention from outside resources. However, DOA realizes there may be some functions individuals may need assistance with and it has developed this administrative manual to aid agency personnel.

REPORTLINE Features

Reportline provides Commonwealth of Virginia agency personnel with the means to:

- View reports **not printed remotely onsite** for **3 years** past the report run date.
- Store electronic versions of these reports on an agency-based server or individual personal computer.
- Perform searches for specific verbiage found in the electronic reports.
- Maintain agency user access internally.
- View Help pages on each page of **Reportline**.

Database Security

State-of-the-art security features are provided to maintain confidentiality of report information.

- **Application Security**—requires a Logon ID and password for system access. Individuals will be required to keep this information confidential to provide the utmost security to Commonwealth data.
- **Secure Socket Layer (SSL)**—uses a 128-bit encryption routine to protect the data as it travels back and forth over the Internet.
- Encrypted File System (EFS)—is an operating system feature that protects sensitive data and prevents unauthorized access to the file directory.



Reportline Overview, Continued

Access Requirements

- Browser must be enabled for Java Script.
- Browser must be enabled for Cookies.
- Browser must be enabled for Secure Socket Layer (SSL) Security (128-bit version).
- If connecting to the site from behind a firewall or proxy server, it must allow SSL (port 443) communication.
- *Internet Explorer* browser, version 4.0 or higher.
- Designed to be viewed at a screen resolution of 800 by 600 or greater, with a minimum of 256 colors.
- Connection speed of 56k modem (or higher) is highly recommended.

Reportline User Security

Security Levels

Reportline has four levels of application security.

- Application Administrator—DOA Database Administration personnel who establish Systems Administrator security.
- Systems Administrator—DOA application specific (i.e., CARS, CIPPS, FAACS) personnel who establish line agency Reportline Security Officer security.
- Reportline Security Officer—Line agency security officer who establishes Individual User security.
- > Individual User—Line agency personnel who utilizes Reportline to access electronic reports.

Individual User Access Set Up by Agency Security Officer Your agency's Reportline Security Officer will set up your individual security so that you can access Reportline.



Reportline User Security, Continued

Reportline Request Form To access specific reports on **Reportline**, your Agency Reportline Security Officer will have you complete the **Reportline Request Form**. **Return the form to your agency's Reportline Security Officer who will add you directly into the Reportline system**. This PDF form is located on DOA's Reportline website for use.

Department of Accounts Reportline Request Form

Augustus and the first		User Type	□ Agency User
Date		· (check one)	□ Agency Security
Logon ID (7 to 9-Character/Alpha-Numeric)			Officer
(7 to 2-character/ipha-rametre)		Action	□ New
Your Agency Number		(check one)	□ Change
			□ Delete
Name	First M	iddle	Last
•	rust m	uuie	Lusi
Signature			
E-mail Address			
Telephone			
Approved Agencies—List	t individual agency numbers		
	agency,		
			<u> </u>
Donout Formillo	—Reportline Ac		LEAVE VDC
	s: BENEFITS, CARS, CIPPS, F.		, LEAVE, VRS
Report Family		AACS, HEALTHCARE,	, LEAVE, VRS
	s: BENEFITS, CARS, CIPPS, F. Level of Security (Choose only one)	AACS, HEALTHCARE,	
Report Family	s: BENEFITS, CARS, CIPPS, F. Level of Security (Choose only one) A. No reports for system	AACS, HEALTHCARE,	
Report Family	s: BENEFITS, CARS, CIPPS, F. Level of Security (Choose only one)	AACS, HEALTHCARE,	
Report Family	S: BENEFITS, CARS, CIPPS, F. Level of Security (Choose only one) A. No reports for system B. All reports for system C. ONLY listed reports for system	AACS, HEALTHCARE,	
Report Family	Level of Security (Choose only one) A. No reports for system B. All reports for system C. ONLY listed reports for system Use next column to list reports	AACS, HEALTHCARE,	
Report Family	S: BENEFITS, CARS, CIPPS, F. Level of Security (Choose only one) A. No reports for system B. All reports for system C. ONLY listed reports for system Use next column to list reports D. All reports for system	AACS, HEALTHCARE,	
Report Family	Level of Security (Choose only one) A. No reports for system B. All reports for system C. ONLY listed reports for system Use next column to list reports	AACS, HEALTHCARE,	
Report Family	S: BENEFITS, CARS, CIPPS, F. Level of Security (Choose only one) A. No reports for system B. All reports for system C. ONLY listed reports for system Use next column to list reports D. All reports for system EXCEPT listed	AACS, HEALTHCARE,	
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Report Family	S: BENEFITS, CARS, CIPPS, F. Level of Security (Choose only one) A. No reports for system B. All reports for system C. ONLY listed reports for system Use next column to list reports D. All reports for system EXCEPT listed Use next column to list reports A. No reports for system B. All reports for system C. ONLY listed reports for system Use next column to list reports	AACS, HEALTHCARE,	
Report Family	S: BENEFITS, CARS, CIPPS, F. Level of Security (Choose only one) A. No reports for system B. All reports for system Use next column to list reports D. All reports for system EXCEPT listed Use next column to list reports A. No reports for system B. All reports for system C. ONLY listed reports for system D. All reports for system D. All reports for system C. ONLY listed reports for system Use next column to list reports D. All reports for system	AACS, HEALTHCARE,	
Report Family	S: BENEFITS, CARS, CIPPS, F. Level of Security (Choose only one) A. No reports for system B. All reports for system C. ONLY listed reports for system Use next column to list reports D. All reports for system EXCEPT listed Use next column to list reports A. No reports for system B. All reports for system C. ONLY listed reports for system Use next column to list reports	AACS, HEALTHCARE,	
Report Family (See List Above)	S: BENEFITS, CARS, CIPPS, F. Level of Security (Choose only one) A. No reports for system B. All reports for system Use next column to list reports D. All reports for system EXCEPT listed Use next column to list reports A. No reports for system B. All reports for system C. ONLY listed reports for system De next column to list reports D. All reports for system De next column to list reports D. All reports for system	AACS, HEALTHCARE,	
Report Family	BENEFITS, CARS, CIPPS, F. Level of Security (Choose only one) A. No reports for system B. All reports for system Use next column to list reports D. All reports for system EXCEPT listed Use next column to list reports A. No reports for system B. All reports for system C. ONLY listed reports for system Use next column to list reports D. All reports for system Use next column to list reports D. All reports for system Use next column to list reports Use next column to list reports	AACS, HEALTHCARE, List Reports Here Fo	or Security Levels C or D
Report Family (See List Above)	S: BENEFITS, CARS, CIPPS, F. Level of Security (Choose only one) A. No reports for system B. All reports for system Use next column to list reports D. All reports for system EXCEPT listed Use next column to list reports A. No reports for system B. All reports for system C. ONLY listed reports for system De next column to list reports D. All reports for system De next column to list reports D. All reports for system	AACS, HEALTHCARE, List Reports Here Fo	
Report Family (See List Above)	BENEFITS, CARS, CIPPS, F. Level of Security (Choose only one) A. No reports for system B. All reports for system Use next column to list reports D. All reports for system EXCEPT listed Use next column to list reports A. No reports for system B. All reports for system C. ONLY listed reports for system Use next column to list reports D. All reports for system Use next column to list reports D. All reports for system Use next column to list reports Use next column to list reports	AACS, HEALTHCARE, List Reports Here Fo	or Security Levels C or D

Reportline Request Form.doc

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Accessing Reportline

Web Address http://Reportline.doa.state.va.us

From the DOA Home Page

If you use the Department of Accounts Internet Home Page, click the **REPORTLINE** button on the left-hand side of the Main Menu.

General Logon With a Valid Password Perform the following steps to logon.

Step	Action	
1	Enter Logon ID (7 to 9 Character/Alpha-Numeric).	
2	Enter your password	
3	Click the Logon button.	
If a corr	If a correct password is entered, the <i>Broadcast Messages</i> page displays.	



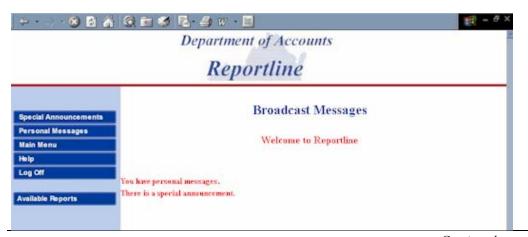
Accessing Reportline, Continued

Navigation

Navigation buttons located in the left-hand margin of the page link you to other **Reportline** pages or perform requested functions as described below.

BUTTON	DESCRIPTION
Log On	Initiates the logon process for Reportline with entry of a
	valid logon and password.
Forgot	Links user to the Forgot Password page where user can
Password	view their previously stored hint or receive an email to
	their previously stored email address providing their
	password.
Contact Us	Allows the user to send an E-mail with suggestions and/or
	questions to DOA.
Security	Links the user to information on application security and
	access requirements that support Reportline .
Available	Links the user to a list of reports that may be available for
Reports	viewing.

You are linked to the *Broadcast Messages* page for messages and other menu selection items.



Accessing Reportline, Continued

Invalid Log On If an invalid Logon ID is entered, the message "Invalid ID" is displayed.



Suspended Account

After 5 (five) failed logon attempts the following message is displayed "ACCOUNT SUSPENDED DUE TO SECURITY VIOLATIONS."



Violations are cleared only by a DOA Systems Administrator. Contact DOA by using the **Contact Us** button to request the violations be cleared. Alternatively, Reportline violations will be cleared each workday evening.

Forgot Your Password?

Forgot Password Button If you have forgotten the assigned password, click on the **Forgot Password** button. You will go to the *Forgot Password* page.



E-Mail Address

If a hint was previously stored, it is displayed.

Also, you may enter the E-mail address previously stored in the security record and have the password E-mailed to that address. The E-mail address entered on this page **MUST** match that which was previously stored. If not, the message, *The Email Address you entered (email address) did not match*, is displayed.



Forgot Your Password?, Continued

Confirmation Message

If a matching E-mail address is entered, **Reportline** provides a confirmation message.



You Receive E-mail

And you receive the following E-mail.

Note: If your Security Officer did not established a hint or E-mail address in the security record (see **Personal Options** topic) the *Forgot Password* page will be blank. Your Reportline Agency Security Officer will have to assist you.



Broadcast Messages Page

Message Page

The *Broadcast Messages* page welcomes you to **Reportline**. It is used to communicate messages both globally and individually to the **Reportline** user population.

In the center of the page, a global message intended for all **Reportline** users is displayed.

Additionally, in the bottom, left-hand corner, informational messages may appear which provide feedback to the user regarding actions which have been taken (e.g., Login successful), actions which should be taken (e.g., you have personal messages).



Navigation

Navigation buttons located in the left-hand margin of the page link the user to other **Reportline** pages or perform requested functions as described below.

BUTTON	DESCRIPTION
Special	If a special announcement is available for viewing, this
Announcements	button displays. Additionally, the informational message
	"There is a Special Announcement" appears in the bottom
	left corner of the <i>Broadcast Message</i> page. Links the user
	to the <i>Special Announcement</i> page and displays additional
	global announcements directed to all Reportline users.

Broadcast Messages Page, Continued

BUTTON	DESCRIPTION
Personal	If a personal announcement is available for viewing, this
Messages	button displays. Additionally, the informational message
	"You have personal messages" appears in the bottom left
	corner of the <i>Broadcast Message</i> page. Links the user to
	the <i>Personal Messages</i> page and displays notices solely
	for the individual Reportline user.
Main Menu	Links the user to the Main Menu page.
Log Off	Returns the user to the <i>Logon</i> page and signs the user out
_	of Reportline.
Available	Links the user to a list of reports that may be available for
Reports	viewing.

Special Announcements Page

Special Announcement

The *Special Announcements* page is used to communicate global messages to the **Reportline** user population. **Reportline** users may read the announcement by clicking on the **Read** prompt to the left of the message or remove the display of an announcement by clicking on the **Delete** prompt.



Navigation

Navigation buttons located in the left-hand margin of the page link to other **Reportline** pages or perform requested functions as described below.

BUTTON	DESCRIPTION
Broadcast	Clicking on this button links the user to the Broadcast
Messages	Message page.
Main Menu	Clicking on this button links the user to the Main Menu.
Log off	Clicking on this button returns the user to the Log On
	page and signs the user out of Reportline .
Available	Links the user to a list of reports that may be available
Reports	for viewing.

Personal Messages Page

Personal Messages

The *Personal Messages* page is used to communicate messages intended solely for the individual **Reportline** user logged on. These messages will be displayed in the center of the page showing: Employee Name, Date of the message, and Message Content.

Reportline users may remove a message by clicking on the 'delete' prompt shown to the left of the Date. An informational message will be displayed stating the message has been deleted. Any message not deleted by the user will automatically be deleted within thirty days.



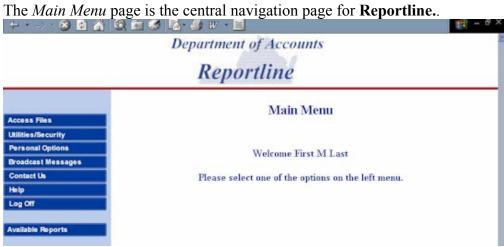
Navigation

Navigation buttons located in the left-hand margin of the page will link to other **Reportline** pages or perform requested functions as described below.

BUTTON	DESCRIPTION
Broadcast	Links the user to the <i>Broadcast Message</i> page.
Messages	
Main Menu	Links the user to the <i>Main Menu</i> page.
Log off	Returns the user to the Logon page and signs the user out
	of Reportline.
Available	Links the user to a list of reports that may be available for
Reports	viewing.

Main Menu Page

Main Menu



Navigation

Navigation buttons located in the left-hand margin of the page link to other Reportline pages or perform requested functions as described below.

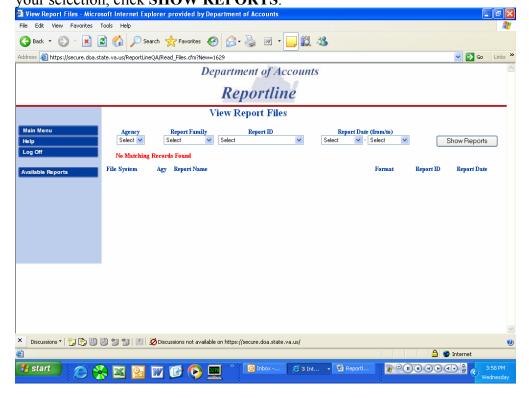
Button	Description
Access Files	Links to a listing reports available for viewing and
	downloading.
Personal	Links to a page containing their personal data such as
Options	name and email address. Changes to personal information
	are made on this page.
Broadcast	Links to the <i>Broadcast Messages</i> page where global and
Messages	individual messages for all Reportline users can be
	viewed.
Contact Us	Links to a page where the user can contact DOA
	regarding problems they are incurring with this site.
Log Off	Returns the employee to the <i>Logon</i> page and signs the
_	user out of Reportline.
Available	Links the user to a list of reports that may be available for
Reports	viewing.

Access Files Page

Access Files

The Access Files page allows you to select specific files to view and/or save at an agency server or personal computer.

The display of the listed reports can be refined by selecting specific items from the Agency, Report Family, Report ID (Note: Reports for which you have Report Family authorization are listed numerically and then alphabetically; they are NOT categorized by Report Family in this pull-down menu.), and Report Date drop down boxes. After you have entered your selection, click SHOW REPORTS.



Access Files Page, Continued

Report Can Be Viewed as a TEXT or PDF File You can view the report online in Portable Document Format (PDF). To do so, you need the Adobe Acrobat Reader software installed on your PC. [This is available as a free download from the Adobe Corporation's web site.] The PDF format feature shows the report in the same layout as it would be printed.

On the other hand, the TEXT (TXT) viewing feature requires downloading the report from the Internet to your desktop PC in order to view it. And, when the report opens, it adjusts to the defaults of your word processing package or text editor—thereby requiring you to manually adjust the formatting to accommodate the way the report should print.

Using Adobe Acrobat Reader Versions 5 or 6?

Important

If you use Adobe Acrobat Reader Versions 5 or 6 and cannot view the report online when you click the PDF button (below), you need to have the Reader open in a separate screen window and not in the Internet Browser.

To do this, make the following Acrobat Reader software setup change:

Version 5 Users

Step	Action
1	Open Adobe Acrobat Reader (START, PROGRAMS, ADOBE
	READER
2	Click <edit> <preferences></preferences></edit>
3	Click <options> in the left menu if it is not already there.</options>
4	Remove the check from the DISPLAY PDF IN BROWSER box.
5	<0K>
6	Close and reopen Internet Browser.

Access Files Page, Continued

Version 6 Users

Step	Action
1	Open Adobe Acrobat Reader (START, PROGRAMS, ADOBE
	READER)
2	Click <edit> <preferences></preferences></edit>
3	Select the INTERNET link from left menu.
4	Remove the check from DISPLAY PDF IN BROWSER box.
5	<ok></ok>
6	Close and reopen Internet Browser.

PDF Format Choice

Click on PDF to view the report using the Adobe Acrobat Reader. The report appears online in the same format as it would appear in hardcopy print. You can use the Adobe software to save and/or print the report. Also, use the "Binoculars Icon" for FIND. You can scroll through a PDF document doing a search & find.

Access Files Page, Continued

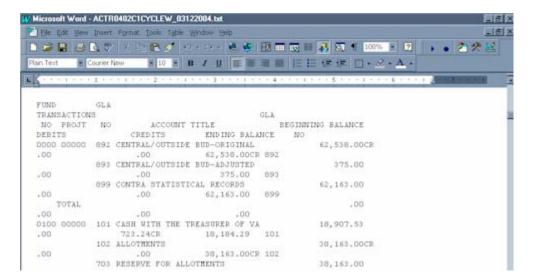
TEXT (TXT) Format Choice

After clicking on **TXT**, a pop-up **'File Download'** box displays. Click on the appropriate action. Typically this will be "Open this file from it's current location." Then click "**OK**."



TXT File Opens in a WP Application

The report opens in a word processing application (typically Microsoft Word or Notepad), but it will be unformatted.



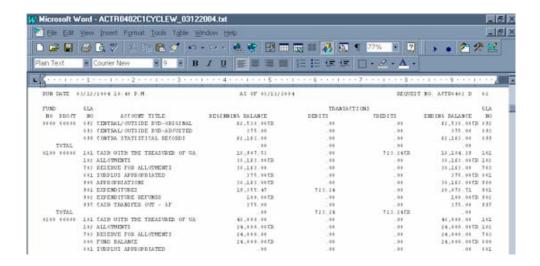
Access Files Page, Continued

Formatting a TXT Report

Perform the following steps to format a TXT report in Word.

Step	Action	
1	Select <edit></edit>	
2	Select <all></all>	
3	Change the font size to nine (9)	
4	Choose <file></file>	
5	5 <page setup=""></page>	
	Orientation = Landscape	
	Margins = .5	

At this point the formatted file can be saved to the agency server or an individual personal computer.



How To Set Up Your Printer to Duplex (Two-Sided) Print—An Example

Duplex Printer Capability Restricted by Printer You can only print duplex (two-sided) if your printer offers duplex printing.

Configuration Example

The instructions given are for Windows 95 operating system and an HP LaserJet 4si printer, but should be similar for other printers and operating systems. Contact your IT staff for assistance with your particular printer setup.

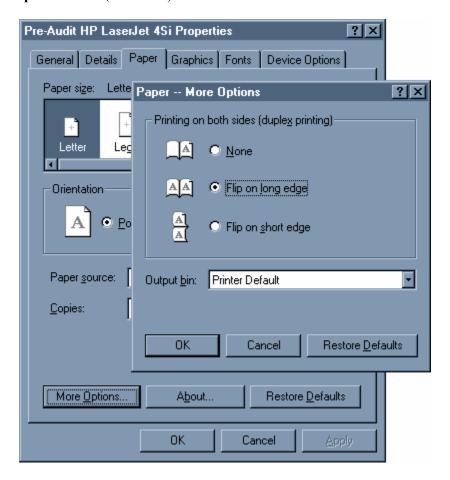
Default Set-Up Procedure

To make the printer default to duplex printing for all documents, perform the following steps.

Step	Action	
1	Click start (lower left-hand corner of your desktop.	
2	Click <settings></settings>	
3	Click < Printers>	
4	Clock on the printer you have set as your default.	
5	Select <properties> from the File Menu</properties>	
	OR	
	Right-click on the printer name and select < Properties. >	
6	For the HP LJ 4si, select the <paper> tab and click <more< td=""></more<></paper>	
	Options.>	
7	From this panel, you can choose how to print the page. To have	
	the document print in a book layout, select "Flip on long edge."	
	For table layout, select "Flip on short edge."	

How To Set Up Your Printer to Duplex (Two-Sided) Print—An Example, Continued

Default Default Set-Up Procedure (continued)

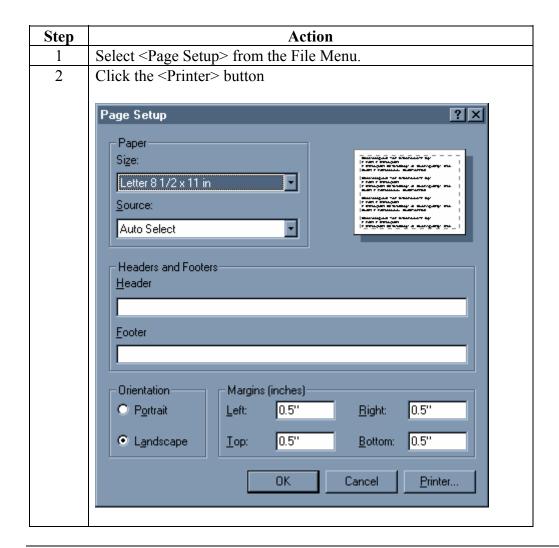


Step	Action	
8	Click <ok></ok>	

How To Set Up Your Printer to Duplex (Two-Sided) Print—An Example, Continued

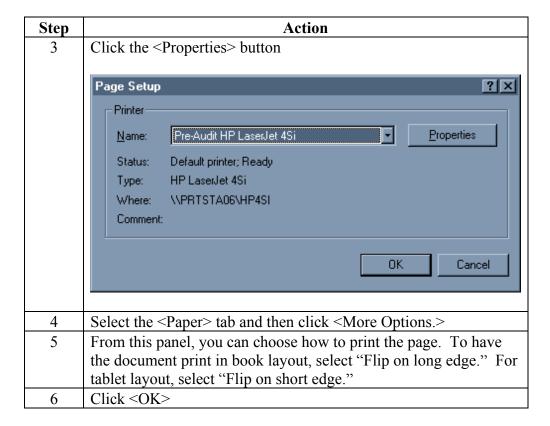
Printing in **Duplex Mode**

To make Acrobat Reader, Internet Explorer, Microsoft WORD, or other single documents print duplex, perform the following steps:



How To Set Up Your Printer to Duplex (Two-Sided) Print—An Example, Continued

Printing in Duplex Mode (continued)



Personal Options Page

View Personal Options

The *View Personal Options* page allows you to view your existing information regarding—

- Logon ID
- Password (the actual password is not displayed, but an * indicates it does exist.)
- Email Address
- Email Address 2
- Hint (to help in remembering current password.)
- Date Password Changed—reflects last date your password was altered.

Navigation buttons located in the left margin of the page link to other **Reportline** pages or perform requested functions as described in the section below.



Personal Options Page, Continued

Navigation

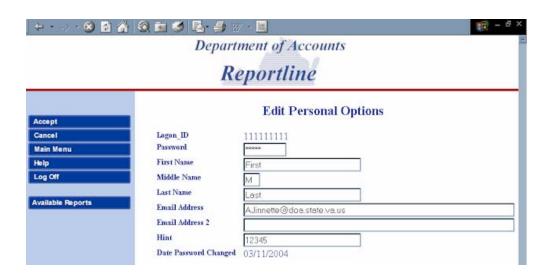
Navigation buttons located in the left margin of the page link to other **Reportline** pages or perform requested functions as described in the section below.

Button	Description
Edit	Clicking on this button links the employee to a page where
	the user may change their password, e-mail address, and/or
	hint.
Main Menu	Clicking on this button will link the user to the Main Menu
	page.
Log off	Clicking on this button returns the employee to the Log On
	page and signs the user out of Reportline .
Available	Links the user to a list of reports that may be available for
Reports	viewing.

Edit Personal Options

The *Edit Personal Options* page provides the **Reportline** user the ability to change any one or all of the following:

- Password (the actual password is not displayed, but an * is displayed for each password character.)
- Email Address
- Email Address 2
- Hint (to help in remembering current password.)



Personal Options Page, Continued

After entering the new information, press the **Accept** button and the information will be displayed on the *View Personal Options* page.

If the information entered is not correct or if the user is not satisfied with the changes, press the **Cancel** button and is returned to the *View Personal Options* page.

Navigation

Navigation buttons located in the left margin of the page link to other **Reportline** pages or perform requested functions as described in the section below.

Button	Description
Accept	Allows the information entered above to be updated. It is
	effective immediately.
Cancel	Links the employee back to the View Personal Options
	page. No changes entered on the Edit Personal Options
	page are accepted.
Main Menu	Links the user to the Main Menu.
Log off	Returns the user to the Log On page and signs them out
_	of Reportline.
Available	Links the user to a list of reports that may be available for
Reports	viewing.

DOA Contact

Contact Us Button

Use Reportline's Main Menu screen's Contact Us button for assistance.

(ReportlineUserManual.doc)